Documents Needed for Retirement Consultation

These documents are necessary to prepare your customized PERSONAL FINANCIAL PLAN. Your personal information will be kept confidential and all documents will be returned to you at the completion of the planning process.

Documents Needed

Social Security Benefit Estimates (Available from SS Dept. 800-772-1213 or www.ssa.gov)	**Yes**
You	
Your Spouse	

Investment Statements	**Yes**
Brokerage Accounts	
Bank Statements	
401k Statements	
403b Statements	
IRA Accounts	
Stock Option Statements	

Most Recent Payroll Stub	**Yes**
You	
Your Spouse	

Company Benefit Plan Information (Group insurance, benefits, bonus & pension plans)	**Yes**
You	
Your Spouse	

Insurance & Annuity Policies and Contracts	**Yes**
Life Insurance	
Disability Insurance	
Long Term Care Insurance	

Wills/Living Wills/ Powers of Attorney/Trust Arrangements	**Yes**
You	
Your Spouse	